

Project Status Report II

Date of Report Issue/Prepared: March 09, 2025

Report Prepared By Team members: Adam Simcoe, Christian Do, Nhan Tran, Nhu Ly, Trang Nguyen

Employer/Organization:

Project Name:	Budget Boss	
Project Team:	Adam Simcoe, Christian Do, Nhan Tran, Nhu Ly, Trang Nguyen	
Period Reporting:		
Overall Project Health	Start Date: Feb 03, 2025	End Date: Mar 09, 2025
	Green (Good) - Yellow (Warning) - Red (Bad)	

Summary

Project Status Summary

The Budget Boss application has been progressing steadily towards our expected final implementation in the coming weeks. Currently, the application's base functionality has been implemented, and progress towards adding further implementations and QoL features has begun. The majority of tabs within the application function fully with our implemented Flask backend, and we have now begun to switch focus in order to implement more of our planned features, as well as improve on our overall design by updating previous functionality, more robust error handling, and increased user friendly features.

Accomplishments As Planned	Planned but not Accomplished
Designed Edit Profile UI	Create logo and splash screen
Developed backend API for profile updates	Design logo and splash screen
Implemented Change Password functionality	Implement splash screen in React Native
Test account update/error handling	Implement budget alerts and reminders
Design FAQ UI	Test notification service
Compile common FAQs for users	
Designed Feedback Form UI	
Set up Formsfree endpoint for submissions	

Test form submission and email notifications via Formspree	
Designed Contact Support UI	
Create IconPicker Component	
Implemented Edit Categories Screen	
Added a default category list for newly registered user	
Basic Functional Categories Tab	Thorough Testing of Frontend and Backend in the Categories Tab
	Create UI components for Report Tab
Added new backend columns for tracking budget spending within the budgets tab	Implement PUT and DEL for budget entries within the backend and frontend
Updated frontend budget form to allow user entry of new budget spent	Update frontend for budget summary page to display individual budgets as drop down list from the concatenated category list
Updated frontend budget summary page to perform frontend calculations using new budget spent column	
Improved error handling with more specific error messages in the fetchUserData and fetchCategories functions of the create transaction screen.	Integrate the overview tab with the back-end database to show dynamic data from users.

Optimized the handleSubmit function by adding more checks and error messages of the create transaction screen.	Interactive Chart that allow users to tap on segments to drill down into specific categories
Added search filtering in the dropdown to enhance the user experience when there are many categories of the create transaction screen.	
Complete CRUD operations for Transactions.	Edge case testing to ensure all operations are working as intended.

Upcoming Objectives for **Mar 08, 2025 to Mar 27, 2025**

		Planned Activities/Tasks for Next Period	
Activity/Task	Assigned To <name/s>	Duration <days>	Date
Brainstorm logo concepts	Trang Nguyen	1 day	March 11, 2025
Design logo and splash screen	Trang Nguyen	5 days	March 12, 2025
Implement splash screen in React Native	Trang Nguyen	1 day	March 16, 2025

Implement budget alerts and reminders	Nhan Tran, Adam Simcoe, Trang Nguyen	3 days	March 17, 2025
Test notification service	Nhy Ly, Nhan Tran	1 day	March 23, 2025
Thorough Testing of Frontend and Backend in the Categories Tab	Nhu Ly	7 days	Mar 8, 2025
Create UI components for Report Tab	Nhu Ly	7 days	Mar 15, 2025
Implement PUT and DEL backend for budgets tab	Adam Simcoe	7 days	Sunday March 16th
Implement frontend functionality for new PUT and DEL in backend	Adam Simcoe	7 days	Sunday March 23rd
Update Budget Summary Page to have option to show list of all concatenated budgets within the category	Adam Simcoe	7 days	Thursday March 27th
Integrate the overview tab with the back-end database to show dynamic data from users.	Christian Do	7 Days	March 16th

Interactive Chart that allow users to tap on segments to drill down into specific categories	Christian Do	7 Days	March 23rd
Implement remaining CRUD operations for transactions	Nhan Tran	3 Days	March 12, 2025
Implement Report Tab with UI components	Nhan Tran	7 Days	March 22, 2025

	Milestones for Next Period	
Milestone (Objective)	Assigned To	Delivery Date
Fully functional Categories Tab	Nhu Ly	Mar 27, 2025
UI components for Report Tab	Nhu Ly, Nhan Tran	Mar 27, 2025
Fully functional Budget Form and Budget Summary page, with all planned implementations	Adam Simcoe	Thursday March 27th

Overview tab to show dynamic data from users and interactive pie chart	Christian Do	Mar 23, 2025
Complete Transaction and normalize all data types with other components of project	Nhan Tran	Mar 17, 2025
Create Logo and Splash Screen	Trang Nguyen	March 12, 2025
Implement Notification Settings	Adam Simcoe, Nhan Tran, Trang Nguyen	March 27, 2025

Managing Issues and Risk (for current reporting period and next period)

Issues/Problems	Resolution Strategy	Due Date
As we continue developing the app, we occasionally encounter aesthetic issues where certain design elements don't align well with the app's overall look. These issues can affect the user experience and make the app feel less polished.	To address these issues, we have been holding quick check-ins to talk through the design issues and discuss the concerns before moving forward. These brief meetings help us stay on track and make necessary adjustments to align the design with the overall vision.	Ongoing

We are still in the process of researching and learning the best way to implement the notification system. The tech stack we plan to use has some complexities, and we are figuring out the best approach to ensure that the notifications are easy for users to manage.	We are holding meetings to discuss what we have learned so far, share findings, and make decisions on how to implement the notification system. These meetings help us stay on track while we continue to research and learn, ensuring we choose the most effective solution for the app.	Ongoing
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Upcoming Risks	Risk Ranking (Hi, Med, Low)	Risk Impact (Hi, Med, Low)	Mitigation Strategy
Data Breach or Security Vulnerability	H	H	Conduct regular security audits, encrypt sensitive data, and follow security best practices to mitigate risks
Low User Engagement	H	L	Enhance user engagement through improved features, personalized content, and marketing strategies.
Changes in Financial Regulations	H	L	Continuously monitor regulatory changes and plan

			for timely app updates.
Development Delays	M	L	Ensure to allocate buffer time in project timelines and regularly assess team progress.
Unexpected Costs	M	M	Regularly track expenses and adjust project scope or timeline as needed.
App Store Rejection	M	H	Thoroughly review app store submission guidelines and implement them early in the development process.
Delayed Market Feedback	M	L	Collect feedback from users early and regularly, and implement a continuous improvement process.
Incompatibility with Future OS Updates	M	L	Monitor updates from Android and React Native to ensure app compatibility.
Outdated Device Compatibility	L	L	Test app on older devices to ensure

			compatibility and minimize issues for users with legacy hardware.
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NOTE: Attach additional sheets if insufficient space available

Submission Guidelines:

Please submit as “W25_T<team number>_ProjectReport2”.

For e.g., W25_T99_ProjectReport2

This is a group submission i.e. one per group.

Due Dates:

Sunday, Mar 09, 2025 (11:59 p.m.)